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DEFINING A BASIC SYSTEM OF EDUCATION FOR MONTANA'S NEXT CENTURY

A Report to the 51st Legislature

December 1988



Montana Legislative Council

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A REPORT TO THE 51ST LEGISLATURE

from the

JOINT INTERIM SUBCOMMITTEE ON BASIC EDUCATION

Prepared by

Andrea L. Merrill

Staff Researcher

December 1988

Published by



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HOUSE JOINT RESOLUTION NO. 16

A JOINT RESOLUTION OF THE SENATE AND THE HOUSE OF REPRESENTATIVES OF THE STATE OF MONTANA REQUESTING THAT APPROPRIATE LEGISLATIVE COMMITTEES AND THE BOARD OF PUBLIC EDUCATION WORK TOGETHER TO ESTABLISH A DEFINITION OF BASIC EDUCATION FOR MONTANA PUBLIC SCHOOLS AND TO DETERMINE THE COST OF PROVIDING A BASIC EDUCATION; TO DEVELOP A FISCAL NOTE PROCEDURE THAT LINKS EDUCATION POLICIES TO THE STATE BUDGET PROCESS; AND REQUIRING A REPORT OF THE FINDINGS OF THE COORDINATED STUDY TO THE 51ST LEGISLATURE.

WHEREAS, a number of Montana school districts have filed suit against the state on the grounds that the state has failed to meet a constitutional obligation to fund its share of a basic quality education for the public school children in the state and has therefore denied an equal educational opportunity to the children:

WHEREAS, the Montana Legislature, through a subcommittee of the Legislative Finance Committee, made a diligent effort to address the definition of basic education and its funding and formulate public policies that would address the issues of this litigation:

WHEREAS, the Legislative Finance Committee formed a subcommittee with the objectives of reviewing the definition of basic education and determining the cost of basic education in Montana:

WHEREAS, the Subcommittee on School Funding defined basic education as the Board of Public Education's school accreditation standards and, with the assistance of the State Office of Public Instruction, attempted to determine a preliminary cost of these standards and, based on available fiscal data, determined the state is paying for the cost of the accreditation standards in a manner not related to the ability or willingness of the school district to supplement the state support:

WHEREAS, the subcommittee determined there is a need to continually review whether accreditation standards adequately define basic education; if so, it is now necessary to further articulate what performance factors are expected from the accreditation standards; review more fiscal data from the schools on the cost of implementing the standards; and provide an understandable method of coordination and articulation among the accreditation standard requirements, student performance expectations, and state funding levels; and

WHEREAS, this further analysis needs to be done with significant opportunity for participation by all groups and individuals concerned about public education and public tax dollars.

NOW, THEREFORE, BE IT RESOLVED BY THE SENATE AND THE HOUSE OF REPRESENTATIVES OF THE STATE OF MONTANA:

- (1) That there should be a thorough interim study regarding:
 - (a) the adequacy of the accreditation standards;
 - (b) the cost of providing services to meet the accreditation standards;
 - (c) a procedure for presenting information to the Legislature on the cost of existing and proposed accreditation standards; and

- (d) methods of funding basic education.
- (2) That to accomplish this goal, the Legislature requests that:
 - (a) the Board of Public Education administer and coordinate a review of the adequacy of accreditation standards, with appropriate assistance from the Office of Public Instruction;
 - (b) the Legislative Finance Committee further develop the cost components of the existing and proposed accreditation standards and evaluate the state financing method for providing a basic education in the public schools; and
 - (c) a legislative interim committee be assigned to monitor and evaluate the Board of Public Education's accreditation standard review and to consider any student performance expectations that may be linked to the accreditation standards and school funding.
- (3) That the Board of Public Education and the two legislative committees coordinate their work to develop a fiscal note and budgeting system that provides articulation between the education policymakers and those responsible for balancing the state budget.
- (4) That the Board of Public Education and the Legislative Finance Committee and a legislative interim committee recommend to the 51st Legislature their definition of a basic education and how such a basic education may be equitably funded.

Passed April 8, 1987.

SUMMARY OF RECOMMENDATIONS

The Joint Interim Subcommittee on Basic Education, in joint action with the Legislative Finance Committee and the Board of Public Education, recommends the following to the 51st Legislature:

- that the instructional portion of a definition of a basic system of education be the school accreditation standards adopted by the Board of Public Education; and
- that the final report of the K-12 Education Subcommittee of the Legislative Finance Committee be accepted by the 51st Legislature, without approval or disapproval, for further consideration in the Legislature's quest for methods of equalizing the funding of K-12 public education in Montana. The report presents that subcommittee's estimate of the cost of meeting the accreditation standards proposed by the Board of Public Education and presents a plan for equalizing the cost of the proposed standards.

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INTRODUCTION TO STUDY RESOLUTION HJR 16

House Joint Resolution No. 16 of the 1987 Legislative Session established a unique mechanism for addressing, during the interim, the anticipated District Court decision on the constitutionality of the Montana school funding system. HJR 16 requested that the Board of Public Education, the Legislative Finance Committee, and an appointed interim committee work together to:

- establish a definition of basic education for Montana public schools;
- determine the cost of providing a basic education and how to equitably fund such a system; and
- develop a fiscal note procedure that links education policies to the state budget process.

Each of the three participating groups was to complete a specific study function.

- The Board of Public Education (Board) was requested to coordinate a review of the adequacy of the Board's school accreditation standards.
- The Legislative Finance Committee (LFC), six members of which were subsequently appointed as the K-12 Education Subcommittee, was to develop the cost components of the existing and proposed accreditation standards and to evaluate methods of financing a basic education.
- The Joint Interim Subcommittee on Basic Education (Subcommittee on Basic Education or Subcommittee) was appointed after the session and was directed

to monitor and evaluate the Board's accreditation standard review and to consider any student performance expectations that may be linked to the accreditation standards and school funding.

HJR 16 acknowledged the events of the previous legislative interim that triggered the need for the coordinated study of major education issues:

- the school funding lawsuit, filed in April 1985, heard in Helena District Court in May 1987, and eventually decided by Judge Henry Loble in January 1988. (See reference no. 5.) The lawsuit alleged that the state does not provide an equal educational opportunity to each Montana student, nor does it fund its share of a basic system of education as required by the 1972 Montana Constitution.
- the 1986 interim work of the School Funding Subcommittee of the LFC to determine whether the Board's current accreditation standards provide an adequate definition of basic education for school funding purposes and to begin to analyze the costs of the accreditation standards;
- the School Funding Subcommittee's final recommendation that the Board and the state's citizens fully review and possibly redesign the accreditation standards if the standards are to constitute part of a basic system of education and form the foundation of any school funding plan designed by the Legislature or mandated by the court;
- the School Funding Subcommittee's recommendation

that the Board establish a student assessment policy (enacted as Chapter 377, L. 1987) and discussion that student performance may be linked to funding of a basic system of education; and

- recognition of the need for a method of budgeting and reporting the cost of any established definition of basic education to those responsible for balancing the state budget.

The resolution stressed the importance of extensive public participation in this major policy area, especially in recognition of the state's revenue projections and public concern over current state taxation policies.

SUBCOMMITTEE DELIBERATIONS AND ACTIONS

The following chronology is designed to highlight the steps of the study process, acknowledge major testimony, list the reports presented to the Subcommittee on Basic Education, and track the Subcommittee's interaction with the other HJR 16 participants. This report refers to deliberations and actions of the other HJR 16 participants. However, each of those entities will submit final reports to the 51st Legislature.

Reports and testimony are numbered to correspond to the reference list on pages 27 and 28. All materials are compiled and on file in the Montana Legislative Council library.

First Meeting of the Subcommittee on Basic Education -- September 17, 1987, Helena

- (1) The Subcommittee approved a staff study plan for its part in the HJR 16 study process.¹
- (2) Claudette Morton, Executive Secretary of the Board of Public Education, and Alan Nicholson, Chairman of the Board, explained that the Board's review of the accreditation standards would be called "Project Excellence: Designing Education for the Next Century". The Board's zero-based approach would be initially developed by the Project's appointed Action Groups, who would determine the "learner outcomes" necessary to meet the educational needs of students from now into the next century and would compare those desired outcomes with the present standards. The Board would also study compliance procedures and the roles of the state, school districts, and school

personnel in student assessment. The Board solicited nominations to the eight curriculum area Action Groups and was committed to select a strong representation of educators, specialists, and lay persons from all parts of the state. The Board expressed its commitment to work with the other two HJR 16 groups to define a basic system of education and its costs.

- (3) A number of interested parties within the education community pledged cooperation with the HJR 16 study process.
- (4) Staff reviewed four reports on school curriculum and basic education in Montana and the nation.² The reports on other states' curricula conclude that few states have developed a statutory or constitutional definition of basic education and that Washington is the only state that links such a definition to a funding formula. The report on Montana traced the history of state policies on school curriculum and previous attempts at defining basic education.

Board of Public Education's Project Excellence
Direction Setting Meeting -- September 18, 1987, Helena

Over 400 educators, legislators, and interested citizens gathered at the Helena Civic Center to help set the direction for Project Excellence, the review of the school accreditation standards mandated by HJR 16. Working in small groups, the participants were asked to "step into the future" and envision what life might hold for the kindergarten class of 1987--the class that will graduate in the year 2000. The groups considered what would change and what would stay the same in

society and for education with regard to the categories of mental and physical well-being, thinking skills, communications, and citizenship. This activity resulted in an interesting collection of projections that were then used by the groups to build consensus and to set priorities about the future role of schools and Montana's education system. The Board published an executive summary of the September 18 meeting.³

Among the dozens of general priorities were the following (not given in any order of importance):

- Education funding is the highest priority and should reflect Montanans' desire to prepare their children and citizens for the challenges of the future.
- Montana education should be an education for world citizenship.
- A school's structure and philosophy should emphasize a cross-disciplinary approach to learning so that students and teachers may view knowledge as interrelated.
- Class sizes must be kept small.
- Local control of schools is essential.
- Teachers should teach the process of thinking, not just content.
- The state should take the lead in developing telecommunications and distance-learning systems for school use.

The Board of Public Education's First Action Group
Meeting -- October 29 and 30, 1987, Lewistown

At the September meeting, the Board solicited nominations for membership on the eight Action Groups, which were to develop new accreditation standards in the areas of school curriculum and service. The final selection resulted in groups that typically included teachers, administrators, school board members, legislators, college professors, county superintendents of schools, and lay persons. The Action Groups utilized specialists and facilitators from the Office of Public Instruction. Action Group members who were also legislators were Representative Dick Corné, Senator Bill Yellowtail, and Senator Bob Brown. The Action Groups were divided into school services (administration, library, and guidance), social studies, communications, mathematics, fine arts, vocational/practical arts, science, and health and physical education.

The Action Groups met October 29 and 30 at the Yogo Inn in Lewistown. Also in attendance were the following members of and staff to the Subcommittee on Basic Education who were invited to participate in the activities: Senators Blaylock, Hammond, and Jergeson; Representatives Schye and Phillips; and Andrea Merrill and Helen MacPherson, Legislative Council.

As an opening activity, the Action Groups were addressed by spokespersons who discussed a number of issues considered by the Board to "overarch" Project Excellence curriculum areas. The issues included special education, educational equity, programs for gifted and talented, and Native American concerns.

Through the evening and second day, each Action Group met to develop a goal statement and preliminary drafts of "learner outcomes" in the group's subject area. Each group also selected dates and places for the next two meetings of that group. The Action Groups were expected to meet in early December and late January to finalize suggested standards.

When drafting the desired learner outcomes, the Action Groups were asked to consider the following: skills and concepts to be learned; attitudes to be developed; and behaviors to be acquired. Grades were grouped as K-3, 4-8, and 9-12.

Action Group Meetings -- November to April

From November 1987 through January 1988, the eight curriculum area Action Groups met at various locations around the state to: develop the subject area goal statements and learner outcomes; determine the processes and resources required of schools to achieve the outcomes; and compare the old standards to any proposed changes. In addition, an Implementation Action Group, consisting of the chairpersons of each Action Group, met in January, February, and April 1988 to refine and coordinate the work of the other Action Groups for presentation to the Board on May 2, 1988.

Second Meeting of the Subcommittee on Basic Education -- April 30, 1988, Helena

- (1) The Subcommittee reviewed the Board's progress to date, including a draft of the proposed accreditation standards. The standards would be presented for public comment at seven public hearings around the state in mid- to late May.⁴

The Board also provided the Subcommittee with a progress report entitled The Rationale Behind the New Standards, which was distributed to all legislators and thousands of other Montanans in preparation for the May public hearings. (See Appendix A.)

- (2) Alan Nicholson, Chairman of the Board, explained the Board's position as a codefendant in the school funding lawsuit, which was decided January 13, 1988, by First Judicial District Court Judge Henry Loble. The Board had asked the court to rule on two issues: whether education is a "fundamental" right under the Montana Constitution; and whether the accreditation standards establish a measure of adequacy by specifying for the schools the minimum upon which a basic system of free quality education must be built.
- (3) Rick Bartos, Assistant Superintendent, Legal Services, Office of Public Instruction, provided the Subcommittee with a copy of the Loble decision.⁵

Mr. Bartos also reviewed for the Subcommittee a summary of the Loble decision that was prepared for the Legislative Finance Committee meeting on January 21, 1988. The summary listed the following conclusions of law gleaned from the decision:

- Education is a fundamental right.
- The strict scrutiny test must be applied.

- To maintain current funding practices, a compelling state interest must be demonstrated.
- Montana's serious economic problem is no excuse for not addressing funding equity.
- Local control is not absolute.
- Disparities in per pupil expenditures may be permissible if they are the result of and closely tailored to educationally relevant factors.
- Drafters of the 1972 Montana Constitution had educational "inputs" or expenditures in mind when they adopted the equality of educational opportunity clause. Educational inputs, as measured by expenditures on educational programs and services, are a proper measure of educational opportunity. Equality of dollar input is a manageable goal.
- The state has not defined a basic quality education.
- The court will retain jurisdiction and will exercise power of judiciary to review what the Legislature develops.

(4) Curt Nichols, Deputy Legislative Fiscal Analyst, presented staff reports prepared for the LFC's K-12 Education Subcommittee on the cost of meeting the current accreditation standards and on public school funding systems in other states.⁶ The cost report presented an estimation of the costs to

schools of complying with the current accreditation standards. Table 28 of that document indicates that the calculated cost of compliance comprised of the general fund, retirement, and insurance costs, was \$355.9 million in fiscal 1986. That amount was 81% of the actual school expenditures statewide for those programs in fiscal year 1986.

Third Meeting of the Subcommittee on Basic Education --
June 23, 1988, Helena

- (1) A Subcommittee member or staff person had attended each of the Board's seven public hearings (except the Miles City hearing) on the proposed accreditation standards. Their observations follow.

Andrea Merrill, staff researcher, reported that the Butte hearing drew many people from Helena and Dillon, in addition to a number of legislators from south central Montana. Comments, on the whole, were positive.

Representative Phillips reported that the Great Falls hearing was well-attended, but was composed mostly of educators. The librarians were quite vocal in their concern about lessening the staffing requirements and the lack of minimum expenditure mandates. Most comments at the meeting were positive, and the negative comments concerned the implementation costs.

Senator Hammond reported that the Wolf Point hearing had about 150 participants, predominantly educators. Most of the testimony was negative,

and the major concern was cost and the fate of existing programs.

Representative Schye reported that the Wolf Point hearing seemed to have representatives from most of the schools in the northeast corner of the state.

Representative Sands reported that the Billings hearing had about 250 persons, mostly educators. There was a marked contrast between responses from Billings, which were generally positive, and the more negative responses from outlying areas, where persons were concerned about the effect on and cost to small schools.

Senator Blaylock reported that the Billings hearing was composed mostly of educators. There was much dissent from the librarians about changes in library standards.

Representative Stang and Senator McCallum reported that the Kalispell and Missoula hearings generated mostly positive comments. However, the librarians were very critical of the proposals. Representative Stang and Senator McCallum were disappointed that the outlying areas and lay persons were not well represented.

Senator Jergeson reported that the Great Falls hearing drew persons from Havre, but not the smaller communities. Comments were mixed.

- (2) Alan Nicholson, Chairman of the Board, offered the Subcommittee a summary of written public comments to date and a compilation of news articles on the

hearings.⁷

Mr. Nicholson responded to various criticisms expressed at the hearings. He reiterated the Board's intent that the proposed standards not be "competency-based"--that is, schools need not show that students score a certain competency rate on the various "learner outcomes", but rather schools must offer the curriculum that gives students the opportunity to learn the desired outcomes and the schools should include assessment measures of their own selection to judge whether the program is properly providing the material. He also stressed that the Board will provide a 7-year phase-in schedule to lessen the impact on schools and the state's financial resources. The Board planned to respond to concerns and revise the standards accordingly, with the help of the Implementation Action Group and other experts, at Board meetings in July and August. At the September meeting, the Board intends to notice the revised standards for rulemaking hearings in November 1988. The Board plans to adopt the standards in December 1988. The standards will be effective July 1, 1989, after the Legislature has met. Section 20-2-115, MCA, mandates that the Board develop a fiscal note for legislative review if a rule proposed by the Board has a significant financial impact. (See discussion of the Legislature's role in implementation of Board rules in reference no. 11 and Appendix D.)

Mr. Nicholson also informed the Subcommittee that at the Board's June 18, 1988, meeting, the Board unanimously agreed that the instructional part of a basic system of free quality public schools

should be defined by the proposed accreditation standards. The Board also agreed that the following were items for consideration in defining a basic system: special education; programs for the gifted and talented; teachers' retirement and benefits; teachers' experience levels; in-service training; support personnel; building insurance; capital outlay for buildings; transportation; up-to-date resources and equipment for the curriculum areas; cocurricular and extracurricular activities; and various school board and local government costs, such as elections.

- (3) Subcommittee members voiced concerns about the Board's outcome-based approach, the absence of student assessment guidelines, how the Board will track and help districts with implementation, and whether the Board would revise its current intention to not specify the number of graduation requirements.
- (4) Jim Goetz, attorney for the plaintiff school districts in the school funding lawsuit, was asked to respond to Subcommittee questions on the Loble decision and the appeal process. He stressed that the plaintiff's position centered on the "equal educational opportunity" clause of the 1972 Montana Constitution and not on whether the state had an adequate definition of a "basic system of free quality ... schools", as used in the constitution. He felt it was "dangerous" and "misleading" to concentrate only on defining and setting in concrete a definition of a basic education when the equity question could be solved by funding in a fair manner the existing education finance system that has evolved in Montana. He

offered a letter in which he had responded to the K-12 Education Subcommittee's cost studies to date. Accompanying the letter was a paper setting forth a number of consensus points that seem to be emerging from dialogue in the Montana education community.⁸

- (5) The Subcommittee used a discussion document⁹ to consider various issues and options related to defining basic education and approved, by individual motion, the following concepts:
- (a) The Legislature should clearly indicate what constitutes the "basic system of free quality public elementary and high schools" required by the Montana Constitution.
 - (b) The term "basic system" should be defined (not merely "basic education", which could imply only instructional components).
 - (c) The following components of a basic system of education should be included in the definition:
 - (i) the instructional part of the system shall consider the accreditation standards (see explanation of this motion on page 14);
 - (ii) special education needs;
 - (iii) programs for gifted and talented students;
 - (iv) teachers' benefits now included in the

- retirement levy;
 - (v) comprehensive insurance now supported by a separate levy for insurance;
 - (vi) transportation;
 - (vii) resources and equipment for a basic instructional program;
 - (viii) in-service training for staff; and
 - (ix) salaries and benefits for support personnel.
- (d) The Subcommittee voted to delay action on including capital outlay and debt service in a definition, but discussed recommending an interim study and delayed effectiveness of these two school budget areas.
- (e) The Subcommittee also moved to exclude cocurricular programs from a definition and took no action on whether to include school board costs, such as elections.

HJR 16 Roundtable Discussion -- Morning of June 23, 1988, Helena

The Subcommittee and the K-12 Education Subcommittee jointly sponsored a roundtable discussion with members of the education community and other interested persons. The purpose of the meeting was to begin building consensus on ways to address the school funding lawsuit and to solicit direction for the remainder of the HJR 16 study process. Dolores

Colberg, Commissioner of Political Practices, was the facilitator. Over 20 interested persons sat with members of the HJR 16 groups to share ideas and interpretations.

Joint Meeting of the HJR 16 Groups -- Afternoon of June 23, 1988, Helena

The three HJR 16 groups shared the actions of their last meetings, with special attention to the Subcommittee on Basic Education's preliminary selection of components of a basic system of education, arrived at the previous day. The K-12 Education Subcommittee noted that, with the exceptions of transportation, capital outlay, and special education, its staff had been analyzing the costs of the various components and the work had already appeared or would appear in the staff reports.

Representative Sands explained his approved motion that the Legislature merely consider the accreditation standards when defining the instructional portion of a basic system of education. He felt it would be irresponsible for the Subcommittee and the Legislature to accept the proposed accreditation standards as a basis for funding and to relinquish the opportunity to modify parts that the Legislature may not want to fund.

Alan Nicholson reiterated the Board's position that the proposed accreditation standards should form the basis upon which the educational system is built and that the K-12 Education Subcommittee had progressed toward "costing out" the quantitative parts of the proposed standards. Legislative members expressed concern over the final cost of the new accreditation standards.

Fourth Meeting of the Subcommittee on Basic Education
-- August 15, 1988, Helena

- (1) The Subcommittee invited Dr. Robert Albrecht, Deputy Commissioner of Academic Affairs, Board of Regents, to comment on the Regents' college preparatory and entrance requirements and to discuss how the requirements could mesh with the proposed standards. Dr. Albrecht explained that in 1987 the Board of Regents adopted entrance requirements and a core curriculum requirement for the six units of the University System in order to help students plan and successfully complete their higher education.¹⁰ The Regents felt strongly about the requirements because approximately 45% of the students who start college leave the system without getting a degree. The requirements will become effective in the fall of 1990. The Regents have agreed to consider modification of the policy if it conflicts the Board of Public Education's proposed standards.
- (2) At its June 23, 1988, meeting, the Subcommittee requested Lee Heiman, Legislative Council staff attorney, to prepare a legal memo on certain questions.¹¹ The Subcommittee's questions and the memo's summary conclusions are reported below.

What are the consequences if the Legislature fails to enact a school funding system to replace the present unconstitutional system?

Conclusion:

Assuming that present funding statutes are unamended but money is appropriated for

distribution, the District Court will, after advice from all parties and probably after hearing, determine a constitutional method of distributing those appropriated funds.

May accreditation standards adopted by the state Board of Public Education be voided by legislative inaction under section 20-2-115, MCA?

Conclusion:

Legislative inaction in funding proposed accreditation standards does not affect the validity of the standards, but because the adoption of the standards is not an inherent constitutional power of the state Board of Public Education, the Legislature may by law change the Board's authority to adopt the standards, thereby rendering the proposed standards invalid in whole or in part.

- (3) The Subcommittee heard a staff report on student assessment policies in Montana and the nation.¹² HJR 16 requires that the legislative interim committee assigned to monitor and evaluate the Board's accreditation standard review also consider any "student performance expectations that may be linked to the accreditation standards and school funding". This policy area was included in HJR 16 as a follow-up to legislation, Chapter 377, Laws of 1987, sponsored in the 1987 session by the Legislative Finance Committee to require the Board to adopt rules for student assessment in the public schools of the state. During the 1985-86 interim, the School Funding Subcommittee of the Legislative Finance Committee

had addressed the cost of funding a "basic education" in response to the school funding lawsuit pending at the time. The student assessment legislation and HJR 16 were successful products of that Subcommittee's work.

Prior to the student assessment legislation, Montana had no state-level requirement regarding student assessment in the schools. School districts exercised local choice in the type and timing of any standardized testing of students.

- (4) The chairman and staff of the Board reviewed recent activities of Project Excellence and revisions to the proposed standards resulting from the Board activities following the May public hearings.
- (5) Representative Sands informed the Subcommittee that he had submitted a copy of the proposed standards to the U.S. Department of Education for comment. He presented the letter received from Chester E. Finn, Assistant Secretary and Counselor to the Secretary.¹³ Mr. Finn criticized the learner outcome approach because it lacked specific content and there appeared to be little mandatory assessment.
- (6) The Subcommittee heard a staff report on state funding for school facilities and debt service, as requested at the June 23, 1988, joint meeting.¹⁴ The report noted that participation in the financing of school facilities ranges among the 50 states along a continuum from full state assumption to no state involvement. Allocation procedures for state aid for capital outlay and

debt service are as varied as the individual state funding mechanisms for current operating and instructional expenditures. In 15 states, including Montana, there are no state programs designed to allocate support for school facility construction or debt service. The remaining states treat capital outlay and debt service as a categorical program separate from their instructional expenditure support programs.

Fifth Meeting of the Subcommittee on Basic Education --
November 16, 1988, Helena

- (1) Alan Nicholson reviewed recent actions of the Board of Public Education. On November 2 and 3, 1988, the Board held public hearings on the administrative rules containing the proposed accreditation standards.¹⁵ In December 1988, the Board will consider the testimony received at the hearings to determine the next course of action. At that time, the Board must also determine which rules have substantial fiscal impact, in accordance with 20-2-115, MCA, governing Board rulemaking. (See Appendix D.) The final report of the K-12 Education Subcommittee suggests that, if implemented, the proposed rules (i.e., the revised accreditation standards and implementation schedules) would cost 10% less than was actually spent by schools in 1986 dollars.¹⁶ Compliance with the current standards would have cost about 20% less than was actually spent in the 1986 school year. The Board may keep fiscal impact standards on hold for the time being and adopt only those standards that clearly have no fiscal requirements, such as items similar to those already in the current standards. The Board has 6

months after a rules hearing to decide whether or not to adopt a proposed rule, and that would give the Legislature time to fully examine any proposed standards that may require new funding.

- (2) Sandra Whitney and Madalyn Quinlan, LFC staff members, presented the final report of the K-12 Education Subcommittee.¹⁷ The report is a summary of action and proposals of 25 separate reports, listed in Appendix B. (The Legislative Finance Committee also met Wednesday, November 16, 1988, and unanimously approved the final report.)

The report's school funding equalization plan includes the following concepts:

- The foundation program will be set at the cost of meeting the proposed accreditation standards plus retirement and benefit costs currently included in the retirement levy.
- Districts will be allowed to spend up to 25% above the foundation amount.
- The first 10% above the foundation amount will be "power-equalized" in that the state will guarantee that 1 mill levied by a district will raise \$100 per ANB (annual number belonging). Any district that raises less than \$100 per mill per ANB will be subsidized by the state. Districts that raise more than \$100 per mill per ANB will be subject to "recapture".
- The remaining 15% above the foundation amount will be generated through unequalized

district revenues.

- The proposal includes a 4-year phase-in of the expenditure cap. Districts that presently exceed the cap must reduce their expenditures by equal amounts over 4 years until the excess is within the limits of the cap.
 - Teacher experience levels will be factored into the foundation program schedules used in determining each district's equalization funding.
 - The current system of funding special education will be continued for the present.
 - Nonexempt P.L. 874 funds (federal impact aid) will be included as a resource for equalization if the overall equalization plan meets the federal wealth neutrality test for equalization of nonexempt P.L. 874 funds.¹⁸
- (3) Jesse Long, Executive Director, School Administrators of Montana, offered a critique of the cost and funding report. He suggested that an additional 5% should be included in the cost calculations. His analysis called for additional funding to cover increases in health benefits, teacher preparation time, and special education costs now funded by local revenues.
- (4) Pat Melby, an attorney representing the plaintiff school districts in the school funding lawsuit, reported that his clients' (and the court's) position is that the standards are only part of a

basic system of a quality education. In his view, the cost and funding plan would fund only 90% of 63% of total school costs and would not provide the equalized funding envisioned by the plaintiffs and the court.

- (5) Chairman McCallum offered the following language as a definition of basic education:

... the courses set by the Board of Regents to gain admission to the University System, plus one credit of physical education; and a graduation requirement of 16 credits. In addition, schools are encouraged to enlarge the curriculum if at all possible. Local districts would be allowed to use any elective subjects to round out the curriculum. It is also recommended that present staffing patterns remain. The work of Project Excellence is appreciated. The proposed recommendation for a definition would allow the state to fund its portion of the School Foundation Program to the desired level.

- (6) Subcommittee members debated the suggested definition, with some members supporting the concept on the ground that high schools cannot avoid offering the college preparatory program, while others argued that the definition did not speak to elementary curriculum or standards and that the Regents' policies, rather than those of the Board of Public Education, would dictate the operation of K-12 education. Following lengthy discussion of the suggested language, Chairman McCallum called for other proposals.

- (7) Senator Blaylock suggested an examination of the

definition of a basic system of education submitted by the staff to the Subcommittee on Basic Education prior to the meeting. (See Appendix C.) Staff noted that the definition was based on the accreditation standards as the instructional component and was, therefore, inconsistent with Subcommittee action to date. (See page 12, subsection (5)(c)(i).) However, the proposed definition was consistent with the assumptions and actions of the K-12 Education Subcommittee.

- (8) Senator Jergeson moved that the Subcommittee recommend the proposed definition, with the intent to go through each component separately for amendment before a final vote was taken. The Subcommittee discussed the various components and sought clarification on the meaning of some language choices and effective dates for implementation.
- (9) Representative Sands moved to substitute for subsection (1)(a) in Appendix C the language suggested previously by Chairman McCallum. The motion failed on a 4-4 tie vote.

Joint Meeting of the Legislative Finance Committee, the Board of Public Education, and the Subcommittee on Basic Education -- November 17, 1988, Helena

- (1) Representative Peck opened the meeting as acting chairman. Alan Nicholson, Chairman of the Board of Public Education, moved that Representative Peck chair the meeting for the day. Senator Blaylock moved that members vote as individuals rather than by committee.

- (2) Representative Peck opened discussion by asking Mr. Nicholson to review the Board's work on Project Excellence and the Board's recommendations to the joint meeting regarding both the proposed accreditation standards and a definition of a basic system of education.

Mr. Nicholson commented that the Board recommended that a definition of a basic system of free quality education be established and that the instructional portion of such a definition be the proposed accreditation standards. Section 20-7-111, MCA, already equates the "basic instructional program" for schools with the accreditation standards. The Board also recommends additional components of a basic system. (See pages 10 and 11 of this report.)

The Board agrees with the K-12 Education Subcommittee's approach of basing funding on the standards, yet the Board believes that certain unavoidable costs were not included in the cost studies and should be considered. Schools that are already using many of the proposed standards should not be penalized by funding schools solely on what was required by the current standards. Mr. Nicholson suggested that the schedules in the report's funding equalization plan should be increased by at least 10% to reflect current costs and practices. (See page 8 of reference no. 16.)

- (3) Madalyn Quinlan and Sandra Whitney, LFC staff members, were asked to review the history of the cost studies and the funding mechanism outlined in the November 11, 1988, final report of the K-12

Education Subcommittee. The report's funding plan suggests that \$507 million in school costs could be equalized in 1990 and \$521 million in 1991. Table 10 of the report indicates that the state's share of the costs would increase by \$166 million in 1990. If a statewide mill levy were used to generate the \$166 million, it would require levying a total of 131 mills statewide, which would include the 45 mills already required and current permissive levies. The current funding structure equalizes 56% of school general funds and retirement levy costs. The proposed plan would equalize 88% of those costs and would reduce the inequities in millage between "high wealth" and "low wealth" districts. The plan may meet the federal equity requirements for using P.L. 874 funds as local wealth at some time in the future.

Senator Regan, Chairperson of the K-12 Education Subcommittee, added that other components of education not included in the cost studies, such as transportation, will need further study to meet the equalization required in the Loble decision.

- (4) Senator Regan moved that the joint meeting accept the K-12 Education Subcommittee's final report for submission to the 51st Legislature. She clarified that the motion would be an action to merely submit the report for further consideration by the Legislature and that a vote for the motion would not be a wholesale acceptance of the figures and concepts in it. Following extensive discussion on what the motion intended, it was decided that, if accepted, the report would be accompanied by a

"memo of understanding".* The motion was then approved unanimously.

- (5) Senator Blaylock moved that the joint meeting accept the accreditation standards as the instructional portion of a definition of a basic system of education. (See subsection (1)(a) in Appendix C.) Senator Jergeson noted that the language in the definition discussed previously and in Senator Blaylock's motion could refer to either the current or the proposed standards.
- (6) Representative Mercer offered to amend the motion to read that any accreditation standards that contribute to a definition would require legislative approval, adding a step that would allay fears that the Legislature might relinquish control over what must be funded.
- (7) Senator Van Valkenburg noted that the state constitution and other laws have given the Board a range of authority to work within, and if there are concerns with Board rulemaking, the administrative rulemaking process allows the Legislature to amend or repeal any Board rule. Others agreed that the Board might be convinced to reserve adoption of the new standards until the 51st Legislature has had time to discuss costs and other school funding issues.
- (8) Senator Blaylock's motion passed with 14 "ayes" and 8 "noes". Following the vote, members discussed adding a requirement of legislative

*The "Memo of Understanding" was unavailable at the time of printing this report.

approval of Board rules on standards, but no further motion prevailed.

The Board plans to document further actions regarding the proposed accreditation standards in a final report to the 51st Legislature.

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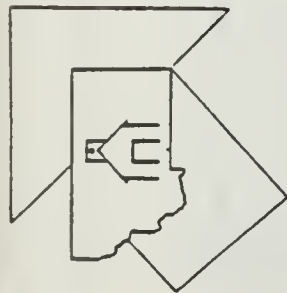
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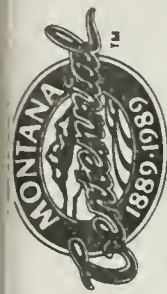
APPENDIX A

THE RATIONALE BEHIND THE NEW STANDARDS
BOARD OF PUBLIC EDUCATION PROGRESS REPORT



PROJECT EXCELLENCE

Designing Education for the Next Century A Progress Report to the People of Montana



From its earliest days as a state, Montana has set standards for its schools. Although the standards have changed throughout the state's first century, they have always reflected the efforts of many Montanans who care about improving education and ensuring the intellectual development and well-being of their children.

In 1987, the legislature directed the State Board of Public Education to undertake a comprehensive review of the current accreditation standards. Over the past year, "Project Excellence: Designing Education for the Next Century" developed common educational goals for elementary

and secondary schools. These goals reflect the thinking of trustees, administrators, teachers, college faculty, legislators, and citizens, who carefully considered what should be the components of the state's basic system of quality education.

The draft version of *A Basic System of Quality Education: Montana School Accreditation Standards* is now available for public review. These pages summarize that document and explain why and how the accreditation review was done, what it means to schools and communities, and how you can become involved.

In these accreditation standards, the State Board of Public

Education, in partnership with the Office of Public Instruction, the education community, and Montana citizens, hopes to define expectations for student learning which will help students meet the challenges of the future. The Board will continue this active partnership to ensure that Montana's schools are equitable, accessible, and excellent; that they fully utilize the skills of Montana educators; and that they foster the constitutional goal of establishing "a system of education which will develop the full potential" of every child in the state.

The Rationale Behind the New Standards

Why were the accreditation standards reviewed?



The Board of Public Education reviews accreditation standards on a regular basis. In Project Excellence, its current review, the Board is seeking extensive public input into designing the foundation of Montana's basic system of quality education. Also, the review is made with an eye to the future. Montanans are increasingly aware of the need to prepare their youth for the challenges of the 21st century, and they want their schools to respond to this need.

Now Montanans are urged to review the draft document. **(Copies are available at local libraries, county superintendents' offices, and school offices.)** If you approve of the standards or wish to voice a concern, please submit your comments or attend one of the seven public hearings in the state (see schedule below).

After the hearings, the Board will review all public comments and revise the draft based on the testimony. In the fall, the Board will hold a formal rulemaking hearing. With the legislative committees, it will then present its report to the 51st Legislature.



What is the school district's role?

Among the many functions a school must perform, none is more important than designing curriculum. Curriculum defines the intent behind instruction and the expectations for student performance. In the new accreditation system, curriculum development and assessment are central issues, but they are local responsibilities, starting with outcomes in the standards, which form a common base for all Montana schools. The standards are minimums—goals that build the "ground floor" of each school. It is the Board's hope that districts will have more flexibility in meeting these state standards but that they will also be more accountable to their constituents.

How were the standards developed?



A 1987 joint resolution of the legislature requested that appropriate legislative committees and the Board of Public Education establish a definition of basic education and propose a method for funding. House Joint Resolution 16 asked for a report to the legislature in 1989, the year of Montana's statehood centennial.

The accreditation review, "Project Excellence: Designing Education for the Next Century," began with a direction-setting meeting in September 1987, when educators and citizens gathered in Helena to focus on the challenges that schools will face in the future.

Eight Program Action Groups, composed of educators, parents, and civic and community leaders from all parts of Montana, then took the material from the direction-setting meeting, as well as practices which are educationally sound, and developed outcome-based standards in specific program areas. These outcomes identify what students should know and be able to do as a result of their education. Next the Program Action Groups determined the requirements, resources, and processes schools need to reasonably reach the outcomes, and finally they compared their recommendations with the current standards to determine what standards will be adequate for students faced with becoming productive citizens in the 21st century. The groups submitted their reports to the Board of Public Education and to the Implementation Action Group, which consisted of the chairperson and a representative from each Program Action Group.

The Implementation Action Group refined the standards, combined the separate reports into one draft document, and presented its recommendations to the Board. The Board added parts to the draft and, in early May, officially accepted it as appropriate for public review.

What is outcome-based accreditation?



The new accreditation standards represent a shift of emphasis from quantitative accreditation to outcome-based accreditation. Outcome-based accreditation requires a school to demonstrate that it provides its students with an educational program based on the general outcomes or goals in the standards. For the first time all schools in Montana will be working on essential learning skills and knowledge that students are expected to possess as a result of their K-12 schooling experience. The purpose of this change is to focus on the quality of educational program rather than on how many or how much of specific resources are needed.

How will our children benefit from the new standards?



The proposed standards are learner based; they emphasize the skills and knowledge our children need as citizens of Montana, the country, and the world. They assure that Montana will continue to have a high quality, skilled work force.

The standards also provide a built-in mechanism for school improvement statewide by requiring continuous program evaluation. In essence, each school assesses itself, in accordance with the standards, and identifies its accomplishments and the areas in need of improvement. In this way, Montanans are assured that their schools constantly strive for top performance at all levels of instruction.

PROJECT EXCELLENCE Public Hearing Schedule

May 16	Kalispell Flathead High School	May 24	Great Falls West Elementary
May 17	Missoula Lewis & Clark Gymnasium	May 25	Wolf Point Wolf Point High School Auditorium
May 18	Butte Butte High School Auditorium	May 26	Miles City Custer Co. High School Auditorium
May 19	Billings West High School Auditorium		

All hearings start at 7 p.m.

PROJECT EXCELLENCE: Designing Education for the Next Century

How will the current

accreditation standards change?

The major shift is to outcome-based accreditation, as described above. In addition, new standards are proposed for school leadership, school climate, and school program in the areas of technology/distance learning, cross-content emphasis, creative and critical thinking skills, and curriculum development and assessment. New categories of accreditation include "Project Excellence Schools"—exemplary schools that exceed the standards and serve as models for effective schools. Another important change is local flexibility.

Where do the standards give schools more flexibility?

In the proposed accreditation standards, local school leaders and the community are asked to take the lead in developing education programs and resources that meet or exceed the state standards. This role is enhanced by flexibility in the areas of:

→ Alternatives

With approval from the Board of Public Education, schools may use alternatives to meet the standards. The Board encourages schools to develop creative programs that help students achieve, or exceed the learner outcomes. If these programs are shown to be successful, local schools may implement them for five years.

→ Staffing

The proposed standards allow schools to develop alternatives in staffing—such as sharing administrators, library/media specialists, or guidance specialists—in order to help students meet the learner outcomes.

While the Board recognizes the need for maximum class sizes and teacher loads, schools may provide aides and support staff or they may show that teaching methods and the quality of instruction nullify the effect of larger class size on student performance.

→ Academic Program

At a minimum, students in Montana schools are offered a balanced academic program based on the courses needed to meet the required learner outcomes. Schools begin with this foundation and design programs that meet the unique needs of their students. Also, a secondary student may seek alternative credits from the local school trustees, assuming that curriculum and assessment requirements were met.

→ Distance Learning

If schools can show a need, they may be able to utilize technology (computer networking, video or audio programs) to meet some of the educational program.

→ Scheduling

The Board of Public Education will seek legislation to allow greater flexibility in the school year and week so that schools may explore nontraditional school calendars such as the four-day week, 45 days in school with 15 days vacation, year round school, and other options.

→ Budgeting

Local schools are not required to meet specific budget figures in any program area.

→ Curriculum Development and Assessment

The Board recognizes that schools and their staff will need additional time to comply with this aspect of the program and is seeking legislation which will allow for time during the school year for staff to work in these areas.

→ Phase In

The Board is aware that some standards, though educationally sound, may require additional fiscal and human resources, and it is planning to phase in those standards.

When will the standards be effective?

The refined standards will be effective July 1, 1989. Standards which require additional district resources will take effect on a phase in basis.

You can be involved!

The Board of Public Education would like to hear from you: Do you approve of the standards? Are there areas that concern you? Which standards will significantly impact your school and how? Are there standards that you'd like to see phased in over a period of time? What suggestions do you have?

Are there outcomes which need modification and, if so, what would you suggest? Are there outcomes which should not be included? Are there groups of outcomes which should be elective (for example: if a course in biology is offered, these are the outcomes it should meet...)?

You are encouraged to comment on the standards at a public hearing in your area (see schedule on page one), or by writing to the Board of Public Education, 33 S. Last Chance Gulch, Helena, MT 59620, no later than May 31.

A BASIC SYSTEM OF QUALITY EDUCATION

A Summary of Proposed Accreditation Standards for Montana Schools

The following is a narrative summary of the accreditation standards proposed in *A Basic System of Quality Education: Montana School Accreditation Standards*. Please refer to the actual document for the original regulatory language and for sections in their entirety.

Each student in the public schools of Montana has universal access to a balanced and challenging education. The education program is equitable and addresses future as well as present needs. When a student working within his or her abilities completes the Montana high school program, the graduate is prepared to be a productive citizen of the state, nation, and world.

Accreditation: A Partnership

Meeting Montana's educational goals requires a partnership of school trustees, administrators, teachers, parents, community, and the state.

The State Board of Public Education is responsible for establishing, maintaining, and reviewing standards for public education (K-12). The Board routinely reviews the accreditation status of each Montana school in order to determine the school's eligibility for state funding. The Board is also responsible for approving a school's proposed alternatives to the accreditation standards.

Each Montana school district is responsible for implementing the basic system of quality education and for molding it to meet its students' education needs. The school district's education program is based on sequentially developed learner outcomes and on the leadership, instructional skills, school climate, facilities, and resources needed to ensure those outcomes.

School Leadership

Leaders in Montana schools serve to help each student reach his or her full academic and personal potential. To this

end, the school commits itself and its resources to instructional excellence and to offering its students a balanced and challenging education.

School trustees establish policies and procedures to meet educational goals. They encourage active participation by all community members, build a positive school environment, and set priorities for fiscal, human, and material resources.

School administrators work with the trustees, staff, students, parents, and community to set educational goals. They provide instructional leadership, keep parents and community informed, and manage the school's daily operation efficiently and effectively.

Teachers understand, respect, and maintain high expectations for all students and set objectives that students clearly understand. They know their teaching areas and use professional teaching skills to help students learn. They evaluate student progress and work closely with parents. They are actively involved in curriculum development, assessment, and improvement.

All staff are certified, assigned, and evaluated according to standards for effective school practices. All school personnel are given opportunities for continued professional development.

School Climate

The Montana public school is a positive partnership of school and community. Its central purpose is the intellectual development of its students; all of its resources are organized in support of that purpose.

School personnel, programs, and services comply with all local, state, and federal laws. The school facility is a safe, healthy place that contributes positively to students' attitudes toward school and to their educational achievement.

The school encourages harmonious staff relationships, respect for learner rights, and a concern for the well-being of others. Students take responsibility for their education and conduct themselves respectfully and appropriately. Parents

and community members take active roles in their children's schooling and help their school set education goals.

The Board of Public Education is seeking legislation to allow school schedules to be flexible so that educational goals are achieved. It is hoped that schools will be able to explore the effectiveness of nontraditional school calendars and report their findings to the Office of Public Instruction.

Academic Requirements

Academic requirements form a solid foundation for each school's education program. At the elementary level, they encourage cross-content experiences and the development of essential learning and thinking skills.

In middle schools and junior high schools, learner outcomes are achieved through a program of English language arts, social studies, mathematics, science, health enhancement, fine arts, and vocational/practical arts. Learner outcomes at the high school level are achieved through a program of English language arts, social studies, mathematics, science, health enhancement, fine arts, vocational/practical arts, and foreign language for a total of 22 units. As a minimum, the high school's graduation requirements include a total of 20 units.

The Education Program

Equal access to learning opportunities and meeting individual learning needs are primary considerations in all school programs, at all levels. The school is encouraged to develop the means to assess the needs of each student, including but not limited to, students identified as gifted and talented, special education, bilingual, at-risk, ethnic minority, and educationally disadvantaged.

The school provides learning experiences matched to each student's interests, readiness, and learning style. Through all of its programs and services, the school recognizes that

cont.



PROJECT EXCELLENCE: Designing Education for the Next Century

The Education Program cont.

cultural diversity enriches individual and collective well-being. The school nurtures an understanding of the values and recognizes the contributions of Montana's Native Americans and the unique needs of Native American students and other minority groups.

The school's education program is an interdependent program of knowledge, skills, and opportunities presented in meaningful contexts. The program integrates skills across subject areas and allows students to use creative and critical thinking skills in order to reach their highest potential and gain satisfaction.

The school provides learning resources that are universally available, free of bias, culturally inclusive, and current. It offers students opportunities for self-direction and decision making. Students are given equal access to resources, including technology. Instruction materials are sequential and compatible with previous and future offerings.

Students have access to a wide range of up-to-date print and nonprint resources, including technology, which support the curriculum and help students prepare for the demands of an information-based society. Technology is a tool for instruction, used by the learner and teacher in partnership.

The school works with the community to enhance educational experiences by using valuable out-of-school resources.

Curriculum Development and Assessment

Each Montana school is responsible for defining and organizing the basic system of quality education into specific curricula. Curriculum development and assessment are cooperative endeavors of trustees, administrators, teachers, specialists, support staff, parents, and community.

The school has clear goals, tools, and procedures for evaluating its curricula on an ongoing basis. The school uses this self-study to identify areas of accomplishment and to modify areas that need improvement.

Program Areas

The school's basic education program includes communication arts, fine arts, health enhancement, mathematics, science, social studies, vocational/practical arts, library/media, and guidance. Curricula in each of these areas are based on learner outcomes: the skills and knowledge students should have as a result of their K-12 schooling.

The learner outcomes are developed sequentially through three checkpoints: completion of the primary level (typically, at the end of grade 3), completion of the intermediate level (typically, at the end of grade 8), and upon graduation (typically, the completion of grade 12). The school incorporates all learner-outcome concepts and skills into its curriculum, introduces them when appropriate, builds on them through the years, and individualizes them to meet student needs.

Each program area includes general program standards and specific learner outcomes. The following excerpts are from the first section (general program standards):

COMMUNICATION ARTS

Language is at the core of successful schooling and living. Through language humans learn beyond their own direct experiences; through their skills, concepts, and experiences in the communication arts, students become educated not merely in "English," but in all subject areas. Thus, effective communication arts programs have a very high priority in the curricula of Montana schools.

The education program in Communication Arts encompasses the study of languages and literatures, the development of reading, writing, listening, and speaking skills, effective media use, and the nurturing of creative, logical, and critical thinking.

In general, a school's Communication Arts program shall

1. Be literature-based and include a wide variety of fiction and nonfiction, representing diverse cultures of Montana, the United States, and the world.

2. Create a "whole language" environment that integrates communication skills in all subject areas and that gives students extensive opportunities to use these skills in meaningful contexts

3. Encourage reading as a search for information, meaning, and pleasure. The program will provide literature of high quality, which is enriching for every age and ability level.
4. Have a writing program that emphasizes process and focuses on the communication of ideas.

5. Have an oral language program that involves students in a variety of speaking, listening, and viewing activities.

6. Give students opportunities to pursue their special gifts and interests through co-curricular offerings such as drama, speech, debate, journalism, literary publications, and humanities.

7. Provide programs that enable students to use their communication arts skills in the community and in the world.
8. Take advantage of the offerings of special groups in education, business, and industry.

9. Be accomplished by activities such as creative dramas, cooperative learning, small-group discussions, whole language experiences, and cross-content projects.

10. Use the language of limited English proficient students to develop more diverse English language skills.

FINE ARTS

The Fine Arts dynamically cultivate all of the senses, emotions, and intelligences. They are the means by which students develop literacy in the symbol systems fundamental to higher order and critical thinking. And, they constitute a dimension of learning which extends and fulfills human experience unlike that of any other discipline.

The Fine Arts includes the visual arts, performing arts, literary arts, and instruction that incorporates arts history, criticism, production, and aesthetics.

A basic Fine Arts program enables a student to:

1. Understand the principal sensory, formal, technical, and expressive qualities of each of the Fine Arts

2. Identify processes, materials, tools, and disciplines required to produce the visual, performing, and literary arts
3. Apply their knowledge of concepts, elements, principles, theories, and processes in the Fine Arts

4. Develop their intuitive and creative thought processes as a balance to learning in the cognitive and psychomotor domains.

5. Make informed judgments about the Fine Arts and about the arts' relationship to the history, culture, and environments of the world's people.

6. Understand the relevance of their education in the Fine Arts to the range of arts professions and to a lifetime of aesthetic pleasure.

7. Use materials, tools, and equipment safely.

HEALTH ENHANCEMENT

Health Enhancement teaches children the importance of achieving and maintaining a healthy lifestyle. It helps them actively protect, maintain, and improve their health and sensitizes them to society's critical health issues.

A basic Health Enhancement program encompasses health education and physical education. It shall:

1. Integrate lifestyle management throughout the curriculum.
2. Focus on the total self and the development of responsibility, values, attitudes, and behaviors.
3. Give students decision making tools for personal health.
4. Address intellectual, social, emotional, and physical dimensions of healthy lifestyles.

MATHEMATICS

Mathematics gives students the skills necessary to solve problems, to reason inductively and deductively, and to apply the numerical and spatial concepts necessary to function according to their needs in a technological society.

Priorities for basic mathematical skills include more than computation. A technological society requires daily use of skills such as estimating, problem solving, organizing and interpreting data, measuring, predicting, and applying mathematics to everyday situations.

Mathematics is a dynamic, growing, and changing discipline whose cross-curricular significance requires its integration into all academic areas. An effective curriculum is responsive to recent developments in mathematical knowledge, the needs of an information society, the availability of technology such as computers and calculators, and includes relevant applications of mathematics.

In a basic Mathematics program, students:

1. Become mathematical problem solvers.
2. Learn to communicate mathematically.
3. Learn to reason mathematically.
4. Learn to value mathematics.
5. Become confident in their ability to do mathematics.
6. Select and use appropriate technology to solve problems and acquire new knowledge.

SCIENCE

Science is a creative process used to investigate natural phenomena, resulting in the formation of theories verified by directed observations. In scientific procedure a problem is identified, pertinent data is gathered, a hypothesis is formulated, experiments are performed, the results are interpreted, and conclusions are drawn.

Science education strengthens students' basic investigative skills and fosters their understanding of and interest in the world. They acquire and apply critical thinking and problem solving skills and information critical to survival in a technological society.

A basic program in Science allows students to:

1. Use scientific processes and communicate how they are used to develop scientific knowledge.
2. Think logically, critically, and creatively.
3. Recognize that scientific knowledge is continually subject to review, verification, and revision.
4. Gather reliable information in all areas of the natural sciences, using laboratory equipment and hands-on activities safely and appropriately.
5. Show competence in measurement and mathematics.
6. Gain and convey information through oral, written, and graphic communication.
7. Recognize the character of independent and dependent variables.
8. Understand the core concepts of current scientific knowledge and use them in problem solving and decision making.
9. Identify problems of individual or social importance and select and apply appropriate scientific techniques to in

SOCIAL STUDIES

Social Studies draws on the social sciences (economics, political science, geography, sociology, anthropology, psychology) and the humanities (history, literature, the arts, and philosophy). The social studies cover United States studies, global studies, and the social science disciplines.

A basic program in Social Studies allows a student to:

1. Participate in meaningful first-hand and hands-on learning activities that draw on experiences in the home, school, neighborhood, and the world.
2. Participate in committee work, role playing, creative drama, classroom discussion, and interviews.
3. Develop research skills, which may include the gathering and recording of information from a variety of sources such as films, pictures, oral and written literature, music, and field trips.
4. Develop citizenship skills through sharing, responsibility, cooperative learning, compromising, conflict resolution, and decision making.
5. Enhance his/her communication skills through drawing, acting, reading, writing, listening, and speaking.
6. Use topics that engage his/her interests and extend per-



PROJECT EXCELLENCE: Designing Education for the Next Century

Social Studies cont.

social context for learning to a global realm. Learning activities are varied and involve the student intellectually, socially, and physically.

7. Nurture an understanding of the contemporary and historical traditions and values of the American Indian culture and other minority cultures of significance to Montana and to social studies in general.

VOCATIONAL/PRACTICAL ARTS

The Vocational/Practical Arts is a program of articulated, well-planned, coordinated, and sequential experiences that prepare students for successful participation in community, home, life, postsecondary education, and work.

The Vocational/Practical Arts program includes Agriculture, Business and Office Education, Home Economics and Home Economics Wage Earning, Industrial Arts/Technology, Marketing, and Trades and Industry.

Vocational/Practical Arts serve students who want, need, and/or benefit from foundations for career planning; communication and computation skills and technical literacy; personal skills and attitudes; broad and specific occupational skills and knowledge; and employment skills, including self-employment.

A basic program in Vocational/Practical Arts shall:

1. Be an integral part of the education program and a complement to the academic program.
2. Motivate students, provide exploratory experiences, and increase career planning and employment skills.
3. Be a cooperative effort of business, industry, and schools, contributing to Montana's economic development.

4. Give students the opportunity to develop their vocational aptitudes to the highest level possible in order to promote success in their postsecondary living experience.

5. Increase students' abilities to function successfully in home, social, and consumer environments.

6. Develop student leadership skills through curricular and co-curricular activities that encourage active interest in the community and in the value of good citizenship.

7. Enable students to use leisure time in a worthwhile manner.

8. Motivate students to master academic skills and demonstrate the practical application of those skills in a working and living environment.

9. Help students apply critical thinking, decision making, and problem solving skills to vocational education and occupations.

10. Develop positive attitudes toward work, respect for quality workmanship, and effective interpersonal skills.

11. Develop an understanding of safe, efficient, and courteous highway use as a passenger, pedestrian, cyclist, or motor vehicle operator.

LIBRARY/MEDIA

The pleasure of reading, viewing, and listening, and the ability to use and manage information are essential for students to function in a global community.

Library/media services bring together the resources and technology that enable a student to:

1. Read for the sake of enjoyment and enrichment
2. Read, listen and view critically.

3. Learn effective ways to find information and material to meet his/her unique need.

4. Organize, analyze, and interpret information.

5. Integrate information across content areas.

6. Reach conclusions.

7. Become a lifelong learner.

To help students achieve learner outcomes, the Library/Media program shall:

1. Teach library media skills in sequence and in the context of the K-12 curriculum.

2. Support and enrich all areas of the school program.

3. Integrate library/media instruction across content areas.

4. Involve students in literature and reading, with the opportunity for reader advisement in an unstructured, informal setting.

5. Give students the opportunity to identify and meet personal information needs.

GUIDANCE

Students of all ages must make many choices that affect their lives, now and in the future. Comprehensive guidance programs are a way to serve the divergent and changing needs of students.

The student is the focus and purpose of a K-12 guidance program, and all students should benefit from it. Guidance counseling is the specific educational service that helps individual students develop their personal, social, educational, and career/life planning skills.

PROJECT EXCELLENCE
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Anita Johnson, Lewistown
Sarah "Sally" Listerud, Wolf Point
Arthur "Rocky" Schauer, Libby
Bill Thomas, Great Falls
Tom Thompson, Heart Butte
Darla Fox, Powderville, Student Representative
Claudette Morton, Executive Secretary

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Senator George McCallum (R), Plains
Senator Fred R. Van Valkenburg (D), Missoula
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Representative John A. Mercer (R), Polson
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Senator Chet Blaylock (D), Laurel
Senator H. W. (Swede) Hammond (R), Malta
Senator Greg Jergeson (D), Chinook
Representative John E. Phillips (R), Great Falls
Representative Jack Sands (R), Billings
Representative Ted Schye (D), Glasgow
Representative Barry "Spook" Stang (D), St. Regis

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- Tammy Elser, Missoula
- Stella Huelhuin, Forsyth
- Anita Johnson, Lewistown
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- Rita Schmidt, Great Falls
- Rodney Svec, Hardin
- Roger Torgeson, East Helena
- Sen. William Yellowstone, Wyola
- John York, Kalispell

- Members of the Implementation Group, Mignon Waterman, Chair

For more information, write or call

Board of Public Education
33 S. Last Chance Gulch
Helena, MT 59620

444-6576

APPENDIX B

REPORTS PRESENTED TO THE K-12 SUBCOMMITTEE

BY THE LEGISLATIVE FISCAL ANALYST STAFF

APPENDIX B

REPORTS PRESENTED TO THE K-12 SUBCOMMITTEE by the Legislative Fiscal Analyst Staff

Topic: Cost of Educational Components

"Description of Methodology Used for 63 Percent," by Sandy Whitney (November 20, 1988).

"Cost of Accreditation Standards Study," by Sandy Whitney (November 13, 1987).

"Survey Sample Size for K-12 Education Questionnaire," by Sandy Whitney (November 19, 1987).

"Schools Eliminated in Survey," by Sandy Whitney (November 19, 1987).

"Education Survey," by Sandy Whitney (January 19, 1988). (Results of a survey designed to verify information reported on fall reports and to obtain personnel information from 48 school districts.)

"Issues Important in Determining a Model to Arrive at a Cost of Meeting the Accreditation Standards," by Sandy Whitney (January 21, 1988).

"Cost Meeting the Current Accreditation Standards," by Sandy Whitney (April 4, 1988).

"Cost of Complying with Current Accreditation Standards Based on District Average Salaries," by Sandy Whitney (May 11, 1988).

"Additional Information on Costs of Education," by Sandy Whitney (June 23, 1988). (Addresses the cost of extracurricular and co-curricular programs, beginning salaries by school size, and average salaries in a five-state region).

"Costs of Complying With Proposed Accreditation Standards," by Sandy Whitney (June 23, 1988).

"K-12 Teacher Salaries," by Sandy Whitney (August 19, 1988).

"K-12 Teacher Salaries: Use of Salary Schedules," by Sandy Whitney (September 17, 1988)

"Determination of a Cost Schedule and Estimation of the Costs of the Schedule," by Sandy Whitney and Madalyn Quinlan (October 19, 1988)

"Teachers Excluded From the Cost Reports," by Sandy Whitney (October 21, 1988)

"Calculated Costs of Complying With the Proposed Accreditation Standards - Fiscal Year 1986," by Sandy Whitney (October 24, 1988)

Topic: Education Finance

"Montana's Public School Funding and Delivery System," by Madalyn Quinlan (November 19, 1987).

"Designing a Public School Funding System," by Madalyn Quinlan (November 19, 1987).

"Public School Funding Systems in Montana, Idaho, North Dakota, South Dakota, Wyoming, and Washington," by Madalyn Quinlan (April 4, 1988).

- "Funding the Accreditation Standards Proposed by Project Excellence," by Madalyn Quinlan (June 23, 1988).

"Options for Funding Insurance and Retirement Costs in School District Budgets," by Madalyn Quinlan (August 16, 1988).

"Options for Equitably Funding a Basic Education," by Madalyn Quinlan (October 26, 1988)

Topic: PL-874 Federal Impact Aid

"General Fund Expenditures of PL-874 Districts," by Madalyn Quinlan (January 21, 1988).

"Equalization of Federal Impact Aid (P.L. 81-874) by Madalyn Quinlan (May 13, 1988).

Topic: Definition of a Basic System of Quality Education

"Will Accreditation Standards Define a Basic System of Quality Education?" by Curt Nichols (May 13, 1988).

Topic: Progress Reports

"Progress of the K-12 Subcommittee and Points of Consensus," by Curt Nichols (August 19, 1988).

APPENDIX C

A DEFINITION OF BASIC EDUCATION SAMPLE LANGUAGE FOR DISCUSSION PURPOSES

A DEFINITION OF BASIC EDUCATION
SAMPLE LANGUAGE FOR DISCUSSION PURPOSES
Prepared by staff of Subcommittee on Basic Education
November 1988

Section 1. Definitions. As used in this act, the following definitions apply:

- (1) "Basic system of free quality education" includes:
 - (a) the basic instructional program defined and specified by the accreditation standards adopted by the Board of Public Education as set forth in 20-7-111;
 - (b) salaries and mandated employee benefits for district certified and non certified employees required to execute the basic instructional program set forth in [subsection (1) (a)], including, but not limited to, special education programs for the handicapped and gifted;
 - (c) resources and equipment required to provide the basic instructional program set forth in [subsection (1) (a)], including, but not limited to textbooks, supplies, media materials, etc.;
 - (d) in-service training and staff development required to execute the basic instructional program in an effective and efficient manner;
 - (f) capital outlay, which means those funds used for the maintenance, improvement, equipping, renovating, or major repairing of school buildings or school facilities, but does not include those funds used for acquisition of land or new construction of school buildings or facilities until July 1, 1995 (or any earlier effective date as provided by the legislature as a result of interim study as required by section

calling for study);

(g) transportation to and from public schools as provided by (current laws or by effective date provided as a result of interim study).

(2) "Foundation program" means the program defined in 20-9-301 (as amended below).

Section. 2. 20-9-301. Purpose and definition of foundation program and general fund. " (1) A ~~uniform~~ basic system of free quality public schools sufficient for the ~~education~~ equal educational opportunity of and open to all school age children of the state shall be established and maintained throughout the state of Montana. The state shall aid in the support of its several school districts on the basis of their financial need as measured by the foundation program and in the manner established in this title.

(2) The principal budgetary vehicle for achieving the ~~minimum~~ financing as established by the foundation program shall be the general fund of the district. The purpose of the general fund shall be to finance those ~~general maintenance and operational~~ costs of a basic system of education of a district as defined in [section 1] and not financed by other funds established for special purposes in this title.

(3) The amount of the general fund budget for each school fiscal year shall not exceed the financing limitations established by this title but shall be no less than the amount established by law as the foundation program. The general fund budget shall be financed by the foundation program revenues and may be supplemented by the permissive levy and additional voted levies in the manner provided by law. "

APPENDIX D

SECTION 20-2-115, MCA

BOARD OF PUBLIC EDUCATION RULES WITH
SUBSTANTIAL FINANCIAL IMPACT

SECTION 20-2-115, MCA

BOARD OF PUBLIC EDUCATION RULES WITH

SUBSTANTIAL FINANCIAL IMPACT

20-2-115. Rules with substantial financial impact -- fiscal note -- effect without funding. (1) When developing rules, policies, and standards under 20-2-121(6), (7), (9), and (11), the board of public education shall determine the financial impact of the rule, policy, or standard on school districts.

(2) The superintendent of public instruction shall prepare a fiscal note for submission to the board, using criteria and assumptions developed by the board. The fiscal note must be prepared within 30 days of a request unless the board agrees to a longer time. The board may also accept other testimony and exhibits on the financial impact to school districts before proceeding to rulemaking.

(3) If the financial impact of the proposed rule, policy, or standard is found by the board to be substantial, the board may not implement the rule until July 1 following the next regular legislative session and shall request the next Legislature to fund implementation of the proposed rule, policy, or standard through the foundation program. A substantial financial impact is an amount that cannot be readily absorbed in the budget of an existing school district program.

(4) A proposed rule, policy, or standard not found by the board to have a substantial financial impact on school districts or funded by the Legislature may be implemented at any time.



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